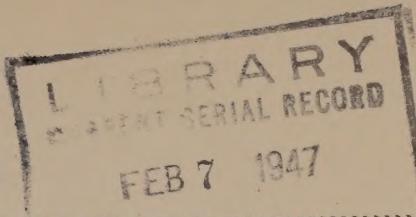


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Position Training Guide No. 2 for Secretaries and their Supervisors

SECRETARIAL TRAINING GUIDE

USDA

Production and Marketing Administration
Personnel Division - Training Section
Prepared by a Committee of
Secretaries and Supervisors

U. S. DEPARTMENT OF AGRICULTURE
Production and Marketing Administration
Washington, D.C.

November, 1946

TO THE SUPERVISOR: This Training Guide has been prepared to aid you in increasing the efficiency of your secretary which is another way of saying ---- to aid you in increasing your own efficiency since you well know that the volume and quality of your output is often dependent upon the work of your secretary.

A secretary may be highly proficient in the basic skills and yet have no idea of how you want routine correspondence answered, the office identified over the phone or a hundred other things that may tear down or build up the work of the office.

To carry out your responsibility in training it will likely be necessary for you to enlist the help of other secretaries and also the Secretarial Training Unit. You will be supplied with two copies of this Guide, one for you and the other for your secretary. It is suggested that you use it as a basis for discussions and work assignments.

TO THE SECRETARY: No matter how proficient you are, you have the desire to improve. That is the purpose of the Training Guide. It is not a complete inventory of the jobs required of you but a list of training activities relating to the usual secretarial duties. On the other hand, some of the activities listed may not be appropriate, depending on your grade and the nature of the work involved. You will think of other training activities you need that are not listed. Discuss them with your supervisor and list them in your Guide.

Frank K. Woolley
Frank K. Woolley, Director
Budget and Management Branch

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PLANNING WORK



Suggested Training Activity

Supervisor

1. Arrange and organize work at beginning of the day in order to have secretary's time utilized to fullest extent.
2. In making daily or periodic assignments demonstrate how to plan work.

Secretary

1. Assist supervisor in setting up a pattern for each day's activities.
2. Take notes on system used by supervisor and make individual plan for own work such as filing, briefing memos etc.



READING AND ROUTING MAIL

Suggested Training Activity

Supervisor

1. Review the work being handled by each member of section with the secretary so she will be able to send material to appropriate individuals.
2. Inform secretary of mail which should receive special handling.

Secretary

1. Make a study of correspondence with relation to work of section in order to determine readily who should handle individual matters.
2. Keep current by checking with supervisor on changes made in operations.

MAKING APPOINTMENTS



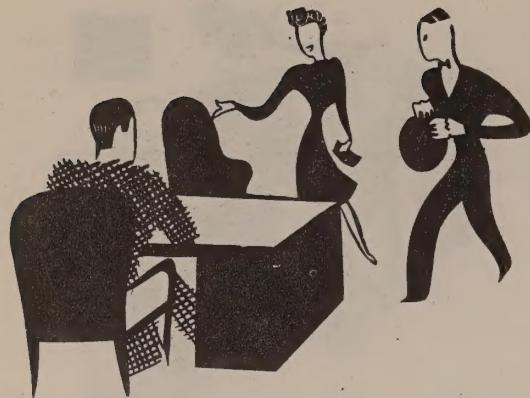
Suggested Training Activity

Supervisor

1. Give secretary any background information that will aid her in making the contact. Give a statement of the nature of the business and the object of the contact.
2. Let secretary know what her responsibilities are in making appointments.
3. Keep secretary informed of any appointments you make yourself.
4. Let secretary know of her effectiveness in making appointments.

Secretary

1. Take notes on the supervisor's request and check with him before making the appointment.
2. Make appointments, and record date, place, time, nature of business and other pertinent information.
3. Maintain a daily calendar so you will know when your supervisor is available for appointments.
4. Read sections on making appointments in available references.



RECEIVING CALLERS

Suggested Training Activity

Supervisor

1. Let secretary know the manner in which you would like callers to be received.
2. Determine how to classify callers as to importance of call etc.

Secretary

1. Upon admitting visitors know what to say and manner in which to say it. Be courteous, considerate and helpful.
2. Be able to determine importance of call. Whether or not you can handle the matter in a routine manner or necessity of referring to supervisor.

MAINTAINING FILES AND RECORDS



Suggested Training Activity

Supervisor

1. Know filing system and review with secretary.
2. Check with secretary to see if she understands present filing system.
3. Acquaint secretary with samples of each record kept and make available to her instructions in maintaining them.

Secretary

1. Go through files noting systems used and type of material filed.
2. Refer to systems of filing given in references on secretarial training.
3. Review records and ask supervisor to clarify points you do not understand.
4. Develop adequate skill and check all proposed improvements in filing system.



DICTATION AND TRANSCRIPTION

Suggested Training Activity

Supervisor

1. Aid secretary in securing stenographic references.
2. Tell secretary what you expect of her in taking and transcribing the dictation. Dictate effectively.
3. Review work with secretary and agree on necessary changes. After initial training make only occasional checks and encourage questions.
4. Apply pamphlet "Better Utilization of Stenographers and Typists" to your office situation.
5. If shorthand and typing speeds are not adequate, arrange to enroll secretary in in-service training classes.

Secretary

1. Secure and study agency shorthand vocabulary and representative samples of correspondence. At all times have available a good dictionary and grammar.
2. Transcribe and assemble notes and during the training period check back with supervisor on the completeness and accuracy of work.
3. Determine if supervisor desires you to make changes in construction and other characteristics desirable in letters.
4. If appropriate arrange for shorthand practice periods with others outside office hours.
5. Discuss training needs with supervisor and take advantage of all training courses made available.

BRIEFING MEMOS, TELEPHONE
CONVERSATIONS, MEETINGS



Suggested Training Activity

Supervisor

1. Determine the type of information that should be briefed and provide secretary with examples and illustrate method of reporting.
2. Make occasional check on accuracy and judgment that goes into briefing.

Secretary

1. Brief materials, telephone conversations, etc., and report to supervisor. Determine from him if types of material briefed and manner of reporting are satisfactory.
2. Check occasionally with supervisor to see if there is any additional material that he would like briefed.



COMPOSING CORRESPONDENCE

Suggested Training Activity

Supervisor

1. Furnish samples of the various types of letters that the secretary is expected to compose.
2. Review letters written by secretary and point out needed corrections.
3. Arrange for secretary to take a course or make an intensive study on letter writing.

Secretary

1. Study sample letters and refer to them.
2. Make corrections and resubmit if necessary.
3. Take a course in letter writing or make an individual study of letter writing.

HANDLING TELEPHONE CALLS



Suggested Training Activity

Supervisor

1. Acquaint secretary with telephone system of the office.
2. Make sure secretary is familiar with the technique of answering telephone. Make available pamphlets on "telephoning". Explain to her how to identify the office.
3. Inform secretary what calls to put through to supervisor and what calls she should handle.

Secretary

1. Becoms familiar with signal sound for each phone and position of switches, etc.
2. Study and practice principles of "Telephone Manners" as explained in the Departmental publication.
3. Keep current on daily transactions so that information can be given out without too much delay.



ANSWERING INQUIRIES CONCERNING WORK PROGRAM

Suggested Training Activity

Supervisor

1. Provide situations for secretary to become fully informed of work program, such as study and review of program of work, observing operations, and becoming familiar with the work of other staff members.
2. Determine the type of information secretary will give out and to whom it will be given. Point out proper references or records from which pertinent information may be secured. Inform staff to aid in keeping secretary current on progress of programs.
3. At intervals discuss status of work with secretary.

Secretary

1. Study each situation that is provided. Take notes and secure charts, forms and other material that may serve as future reference.
2. Answer inquiries accurately, completely and with dispatch or make proper referral on inquiries not authorized to answer. Make note of shortcomings and devise ways of overcoming them.
3. Keep current as far as practical on the progress of the various operations about which information is requested.

OFFICE HOUSEKEEPING



Suggested Training Activity

Supervisor

1. Instruct or provide instruction for secretary in methods of ordering supplies and maintaining stock, etc.
2. See to it secretary understands the necessity of keeping desk and table tops in office clean and orderly.
3. Give assistance in securing information on care of typewriter and other equipment.

Secretary

1. During the training period check requisitions with supervisor for acceptability.
2. Follow instructions on cleanliness and orderliness. See to it that necessary supplies, i.e., pencils, paper, ink, etc., are available to the supervisor.
3. Study instructions on "Easier Typing".



SECURING AND MAINTAINING REFERENCE MATERIAL

Suggested Training Activity

Supervisor

1. Acquaint secretary with type of material and information necessary for performing work of section. Inform her where and how it can be obtained.
2. If a charge out system is needed confer with secretary and agree upon method to be used.

Secretary

1. Review references on hand and keep current on other publications and material pertinent to the operations of the office.
2. Install filing system and check with supervisor for completeness and accuracy.

FOLLOW-UP WORK



Suggested Training Activity

Supervisor

1. At the beginning of the training explain to secretary the types of follow-up needed and give examples such as:
 - (a) follow-up needed on assignments made to staff
 - (b) correspondence
 - (c) reminder of pending work
 - (d) requests for information from people outside unit.
2. Suggest the need for follow-up on items as they come up until sure secretary recognizes how to handle each.

Secretary

1. Set up follow-up system and check appropriateness with supervisor.
2. Study each item until follow-up activities are readily recognized.



PERSONAL TRAITS

Suggested Training Activity

Supervisor

1. Discuss with secretary personal traits that are required for having an efficient office.
2. Encourage continued care in personal upkeep.
3. Make an effort to set an acceptable example.

Secretary

1. Observe customs of office and personal traits of other secretaries. Pattern after best.
2. Accept constructive criticisms willingly.
3. Study references such as "How To Be a Super Secretary" and make use of helpful suggestions.

ADDITIONAL TRAINING ACTIVITIES

Supervisor

Secretary

SELECTED REFERENCES

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